

THE GIVING YEARS

*ENGAGING THE TIME,
TALENT, AND
EXPERIENCE OF OLDER
CALIFORNIANS IN
INTERGENERATIONAL
SERVICE*



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BACKGROUND AND ACKNOWLEDGEMENTS

To conduct this study of senior volunteering in California, GO SERV collaborated with a number of leading organizations and individuals throughout the state. Information was gathered for this report through a survey of over 500 randomly selected older Californians, four focus groups, five forums of representatives from senior service programs, schools, and other organizations, and a review of existing research. In addition, GO SERV conducted three key informant interviews with senior volunteers—Alan, Ned and Claire. Their last names are not used in this report to protect their privacy. GO SERV wishes to thank the three volunteers for participating in the interviews and providing their valuable perspectives. GO SERV modeled its survey of older Californians on the research designed by the University of Hawaii’s Center on Aging (Cheang and Braun, 2001).

GO SERV convened a core planning group comprised of representatives from Civic Ventures, a San Francisco-based national non-profit that promotes the social contributions of older Americans and has established its signature program, Experience Corps; AARP, the widely recognized non-profit advocate and resource provider to older Americans; the Corporation for National and Community Service (CNCS), the federal agency that administers the National Senior Service Corps, as well as other national service programs that provide opportunities for Americans of all ages; and GO SERV Commissioners Bob Riley, Karla Crawford, Roger Hancock, Javier LaFianza, Alex Reid, and Mae C. Woo.

GO SERV wishes to thank all of the practitioners, volunteers and seniors, without whom none of this would have been possible.

This report is published in memory of John W. Gardner, former Secretary of Health, Education, and Welfare, a true visionary whose work has served to shine a light on the gift of time and talent that seniors have to share, and whose life was dedicated to service and creating opportunities for others.

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EXECUTIVE SUMMARY: THE GIVING YEARS

This report is in response to the Governor's request to assess the potential impacts and rewards of engaging senior volunteers in service opportunities throughout the state. Consistent with the legislative intent of AB 2558 (Hertzberg, Chapter 597 of the Statutes of 2000), this report focuses on seniors in service to youth and answers the following key question:

How can more seniors be engaged in service and volunteerism, specifically with respect to strengthening educational opportunities and academic achievements for school children?

The results of this report, the first comprehensive look at California's seniors in service, reveal that California's senior population wants to focus on one of California's primary challenges—ensuring that all schoolchildren achieve academic excellence. And by combining the growing senior population with that of the increasing student population, California can help augment the academic achievement of our school children.

California Seniors: A Rich and Rapidly Growing Resource

As Baby Boomers reach retirement age, the ranks of older Californians will grow from 3.7 million to 8.9 million—a staggering 2.4 fold increase (California Department of Finance). Simultaneously, the number of people under 20 will also grow rapidly over the next 30 years. These children will need additional help in order to succeed in school, and seniors are able and interested in helping.

“We believe, without being immodest, that the large numbers of us over age 65 constitute a rich reservoir of talent, experience, and commitment potentially available to society.”

—John W. Gardner, founding chairman of Common Cause and former Secretary of Health, Education and Welfare

The Retirement Years: Older Californians Choose Volunteering

GO SERV's survey of older Californians found that today's seniors seek a different kind of retirement: 45% of those surveyed said that they wanted to “learn new skills;” 37% stated they want to “set new goals and pursue new challenges;” and only 13% said they wanted to “take it easy” during retirement.

In addition, the volunteer roles that most interest seniors match well with California's needs: 39% are interested in

“reading with children/adults;” 32% chose “teaching/tutoring;” and 30% indicated they wanted to become a “mentor.” Clearly, California seniors are prepared to make a commitment to volunteer within our state’s schools. California’s next step in turning this interest into action is to connect these seniors to volunteer opportunities.

Volunteering: What Will it Take to Engage More Seniors in Service?

Despite seniors’ interest, volunteering currently drops off at retirement. Also, according to Independent Sector, volunteering by Americans age 55 and over dropped from 4.4 hours per week in 1995 to 3.3 hours in 1998 (Independent Sector, 2000). Yet current research indicates that retirement frees up on average 25 hours for men and 18 hours for women (Freedman, 1999).

Clearly, there is a conspicuous gap between the desire to volunteer and the act itself. But research has shown that 84% of seniors who were asked to volunteer did so, which indicates that asking serves as an essential bridge between the desire and the action (Independent Sector, 2000). One of the most limiting factors preventing California seniors from becoming volunteers is the lack of meaningful service opportunities within the state. These meaningful opportunities are characterized by a formal structure for recruiting, screening, training, supervising and supporting each volunteer. The small number of structured volunteer programs will become a greater constraint as the senior population continues to increase in California.

Recommendations: Create, Connect, and Coordinate

The study’s recommendations are based on the premise that California will develop policies that: (1) recognize seniors as a vital resource; (2) transition a whole new generation of seniors into productive roles; and (3) demonstrate how state government can strengthen communities in a new way—by supporting the actions of individual community members. The recommendations focus on how to create high-impact volunteer opportunities, connect interested seniors with service opportunities, and coordinate efforts at all levels—federal, state and local.

California has laid the foundation for improving academic as well as social outcomes for students statewide through a variety of reforms and initiatives, such as class-size reduction and afterschool programs, all of which have a proven track record of success. Fortuitously, seniors have a demonstrated interest in volunteering in precisely these types of educational settings. The development of a blueprint will allow California to take advantage of the unprecedented opportunity presented by the aging population of California.

CALIFORNIA'S SENIORS: A RICH AND RAPIDLY GROWING RESOURCE

Today's seniors are unique: they're healthier; they're better educated; they will live longer in retirement than seniors from generations past (Freedman, 1999). As the Baby Boom generation—those born between 1946 and 1964—reaches retirement age, the number of older Californians will increase dramatically. California's 65 and over population will swell from 3.7 million in the year 2000 to 8.9 million in 2030—a staggering 2.4 fold increase (California Department of Finance).

This explosive growth and the potential impact of this generation becoming older—no longer contributing to the state's workforce, yet creating demands on state resources in areas such as health care—looms on the horizon and will have to be addressed by policymakers. From one viewpoint, this new generation of seniors could be seen as the next crisis around the corner, but this view is entirely dismissive of the impact seniors could have on critical state and community needs, including the educational challenges faced by many of California's schoolchildren.

The time, talent, experience, and growing ranks of older Californians have led one authority to call seniors “our only increasing natural resource” (Freedman, 1999). If this resource is overlooked, the loss, especially when juxtaposed against the success rate of California's schoolchildren, will be tremendous. Seniors should be viewed as an unparalleled civic asset—a diverse army of volunteers who can work in our schools to help struggling students succeed.

Over the next thirty years, the needs of California's schoolchildren will be immense. While the senior population in California will grow over the next 30 years, so too, will the number of people under the age of 20. California will see a 50.4% increase in the number of individuals 19 and under by the year 2030 (California Department of Finance). Should reading proficiency levels found in the 1998 National Assessment of Educational Progress continue, by the year 2030 this population growth will result in more than 400,000 4th graders reading below the basic level (Ballator and Jerry, 1999). To meet the needs of tomorrow's generation, today's leaders have the opportunity to issue a call to seniors to participate in a partnership that would apply their lifetime of learning to ensuring the academic success of the next generation.

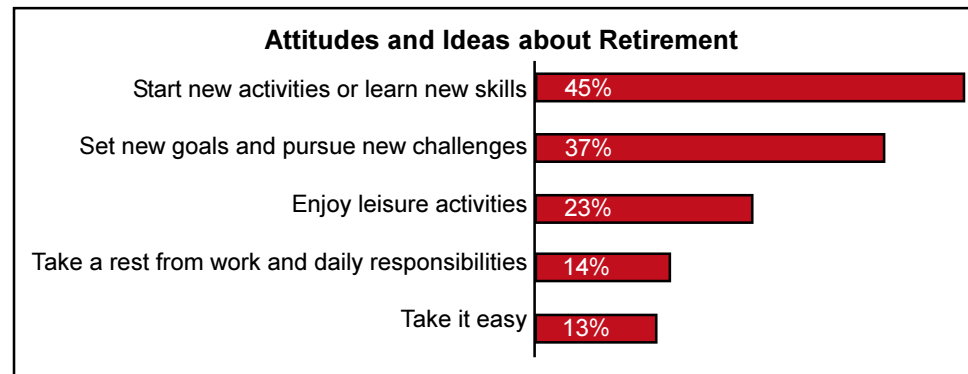
California Senior and Youth Populations (in millions)			
	2000	2030	Change
65 and older	3.7	8.9	240%
19 and under	10.7	16.1	150%

Source: US Census Bureau, California Department of Finance

THE RETIREMENT YEARS: OLDER CALIFORNIANS CHOOSE VOLUNTEERING

A number of surveys have been conducted over the past four years, exploring seniors' plans for retirement and their interest in volunteering (O'Neill and Roberts, 2001; Independent Sector, 2000; Peter D. Hart Research, 1999; AARP, 1997; Cheang and Braun, 2001; Field Research Corporation, 1999; and LaFrance Associates, 2001). The findings are remarkably consistent, whether the surveys are national or local in scope. California's seniors are an extraordinarily diverse group, yet their collective view of retirement is changing. Today's seniors express great interest in learning new skills and pursuing new challenges, rather than relaxing and taking it easy.

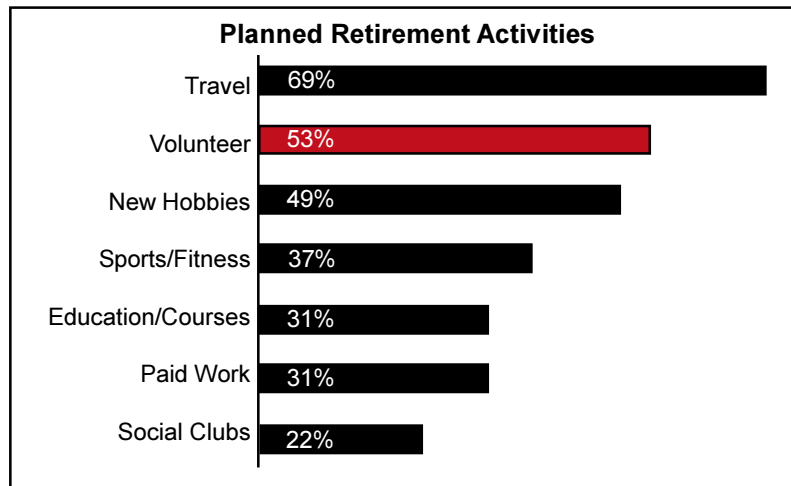
The attitudes about retirement are changing—nearly half of all seniors surveyed responded that they wanted to try something new. Clearly, today's senior population is creating a new kind of retirement for the new millennium.



Source: GO SERV, *The California Assessment of Seniors and Service*, La France Associates, June 2001

Current and subsequent generations of seniors in California, and throughout the nation, are now seeing volunteering as an important part of retirement. The following comment made by Alan, a senior volunteer, during an interview captures the significance of volunteering and the idea of giving back during one's retirement; *"I was in Georgia when Carter ran for President. He wasn't all that well thought of, but he was the guy—the underdog coming from behind...But, I'll tell you one thing, and regardless of what anyone has done now, he has modeled what an ex-president should be—ex-anybody should be. We are all just models. And how nice it would be for some son or grandson to go around saying, yeah, my granddad is a Big Brother. Yeah, my granddad sits with dying people in*

hospitals.” As the graph below indicates, seniors want to take time in their retirement to stay active and purposefully engaged.



Source: GO SERV, *The California Assessment of Seniors and Service*, La France Associates, June 2001

As Alan said when asked about volunteering during an interview, *“It’s a way of giving credence and credibility to my later years, where I’m not employed. So people ask me if I’m retired, and I say no, I’m gainfully unemployed.”*

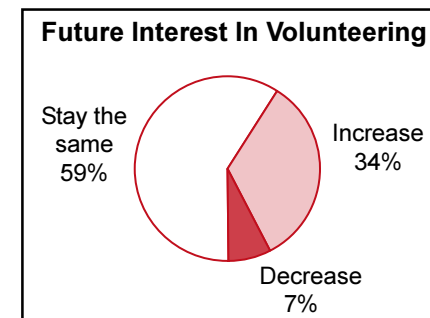
Seniors have a strong desire to engage in meaningful service if asked to volunteer and supported in that service. In fact, 34% of seniors responded in our *California Assessment of Seniors and Service* survey that they were interested in increasing their volunteer activity over the next two to three years.

Why Volunteer?

Seniors volunteer to “make a difference.” Over 77% of current senior volunteers responded that they volunteer because they have “accomplished something real and useful” (LaFrance Associates, 2001). As one senior volunteer stated, *“the reason I’m volunteering is because I want to contribute to the place where I live.”* Other equally important reasons why seniors volunteer include:

Leaving a Legacy

William James once said that, *“the great use of life is to spend it for something that will outlast us.”* Everyone would like to be remembered for something, and volunteering provides an opportunity to leave a legacy, something that has lasting value. Over 74% of the respondents marked “true” to the survey statement that they would serve “if I knew the volunteer opportunity was meaningful, or made a difference in people’s lives” (LaFrance Associates,



Source: GO SERV, *The California Assessment of Seniors and Service*, La France Associates, June 2001

2001). A senior volunteer from Los Angeles said it best: *“It’s leaving your mark on another person. That’s the reason why a person volunteers.”*

“It keeps me alert and alive. Alert because it keeps my mind going. Alive because I went into remission from leukemia for 17 years, and then my cancer came back in ’96. Every time I look at the young kids, it gives me something to think about. Actually, being with kids gives me a long-term commitment. Now I’m on my second leg of remission.”

—Focus group participant, San Francisco

Live to Serve, Serve to Live

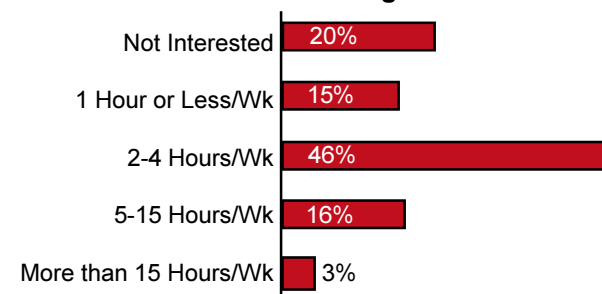
Numerous studies have proven that volunteering is good for your health. Simply put, seniors who volunteer live longer and healthier lives than those who do not; or as Harvard political scientist Robert Putnam states, *“civic engagement is the health club of the twenty-first century”* (Putnam, 1995). In a longitudinal, ten-year study funded by the MacArthur Foundation, volunteering was found to have a significant correlation to healthy aging (Rowe and Kahn, 1999). And a thirteen-year study by Harvard’s

School of Public Health found that social connection is more important than either diet or exercise for maintaining health in later life (Glass, 1999). Seniors themselves know that staying engaged during retirement can prolong their life as indicated by this statement by Alan during an interview: *“I suspect that there is a sufficient number of people around who just want to ward off boredom. You give them a good reason to get the hell out of the house, not only will you prolong their life—people live 10 to 15, 20 years longer—as I remember the mortality rate accelerates right after retirement, if it’s not replaced by something that captures a person’s imagination.”*

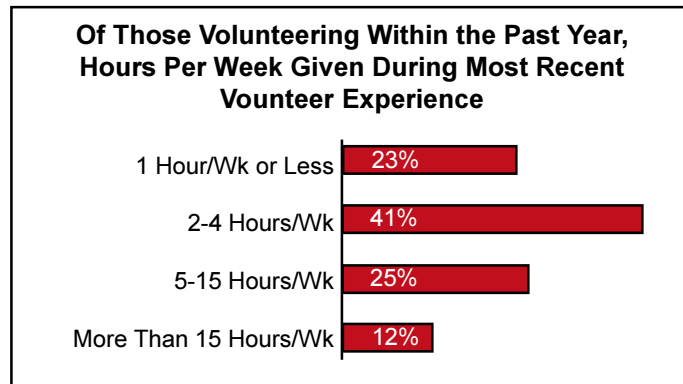
Time Available

Retirement provides seniors with more time to serve. According to time-diary studies conducted by the University of Maryland, retirement frees up 25 hours a week for men and 18 hours for women (Freedman, 1999). In fact, the following chart indicates that 46% of seniors would be interested in volunteering for 2-4 hours per week. In addition, more than one in ten seniors (16%) would volunteer between 5-15 hours per week. Seniors are interested in committing a substantial amount of their time

If You Were to Volunteer in the Future, How Many Hours Would You Be Willing to Contribute?



Source: GO SERV, *The California Assessment of Seniors and Service*, La France Associates, June 2001



Source: GO SERV, *The California Assessment of Seniors and Service*,
La France Associates, June 2001

challenges, volunteers can attest to its intrinsic value—the intangible yet meaningful component of service that connects people, bringing individuals together.

to volunteering. A quarter (25%) of those seniors who were surveyed indicated that they routinely volunteer between 5-15 hours per week. When asked why he volunteers, one senior responded: *“Time and ability, I think are the two answers to that. I do have the time to devote to it and I feel confident I have the ability to give something to the community.”*

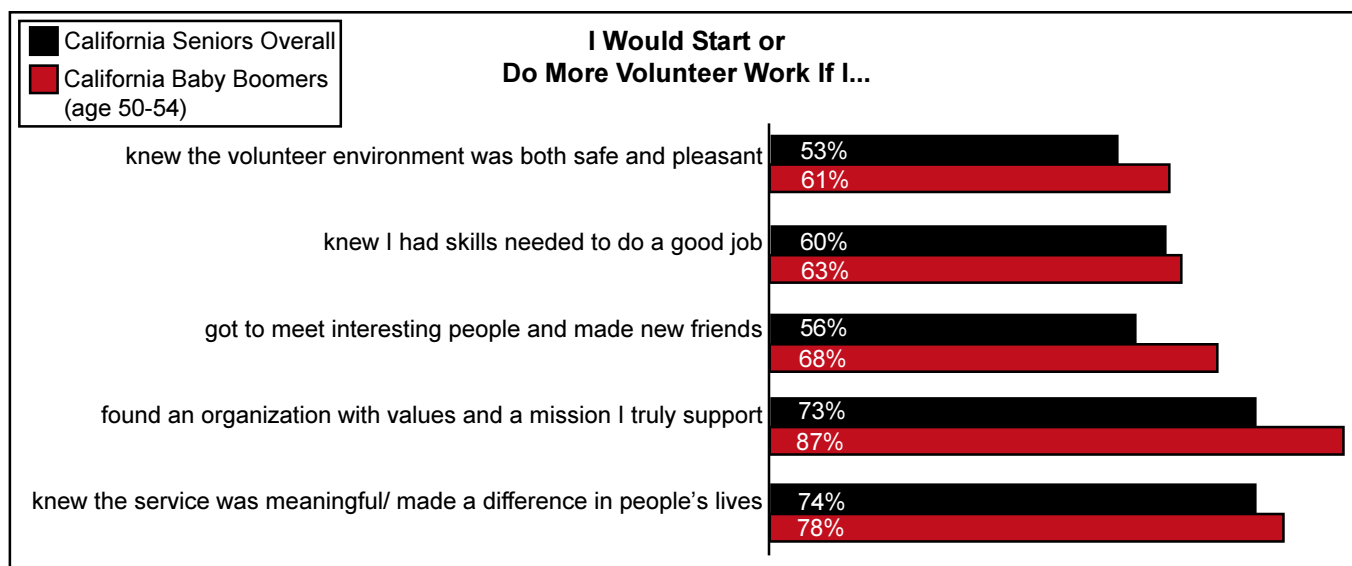
There are myriad reasons why people choose to volunteer. Our research has shown that people from all walks of life choose volunteering. Everyone recognizes the importance of service. Not only does service help to solve community

VOLUNTEERING: WHAT WILL IT TAKE TO ENGAGE MORE SENIORS IN SERVICE?

It is clear seniors want to volunteer in order to make a difference in their communities and that engaging in service helps seniors live longer, healthier lives. In addition, seniors have time to serve. Yet current rates of participation are mixed. Currently, volunteering drops off sharply after retirement, and television viewing increases to consume half of seniors' free time. According to the Independent Sector, the number of hours seniors volunteered nationally dropped from 4.4 hours per week in 1995 to 3.3 hours per week in 1998 (Independent Sector, 2000). How can the gap between seniors' interest and participation be bridged?

Asking and Assurances

First, we know we can count on seniors to step forward when asked. Research shows that 84% of seniors who were asked to volunteer did so (Independent Sector, 2000). Even seniors who have not yet volunteered indicate that they would respond favorably if called to serve, given these assurances:



Source: GO SERV, *The California Assessment of Seniors and Service*, La France Associates, June 2001

Creating More Formal Opportunities

We are all familiar with “informal” volunteering, though we may not recognize the term. Informal volunteering includes many activities we might not think of as service—most commonly, providing emotional support to a friend, helping a relative with household tasks, driving a neighbor to an appointment. People often volunteer informally by helping friends and family directly rather than “formally” through a non-profit organization or local school, according to the study by the University of San Francisco, *Giving and Volunteering in California*. Over 73% of seniors age 65-74 claimed to be volunteering informally compared with 51% formally (O’Neill and Roberts, 2001).

While most senior volunteers indicate that the service they provide is informal, a greater percentage—74%—would serve formally, as indicated in the chart above, if they could find an organization whose mission and values were compatible with their own (LaFrance Associates, 2001). As important as informal volunteering is to strengthening the fabric of communities, it is formal service that ensures that prospective volunteers are screened, well-matched with service opportunities, trained, supervised, and that their efforts are recognized and coordinated with the work of teachers, reading specialists, afterschool program and other staff. As Alan responded during an interview question about formal volunteer programs, “*Anybody can see the difference between filling time and being productive.*” It is through a formal volunteer opportunity—a tutoring program, for example—with its attendant structure and consistency that can best address the educational needs of California’s children.

California’s current system of senior service provides a foundation of experience and expertise upon which to build a solid framework for expanding service opportunities, both now and into the future. The senior service programs are well-established, effective and interwoven into their communities. That they have been so successful with so little funding is a testament to the commitment of volunteer practitioners. However, decades of limited funding have stretched the capacity of these programs.

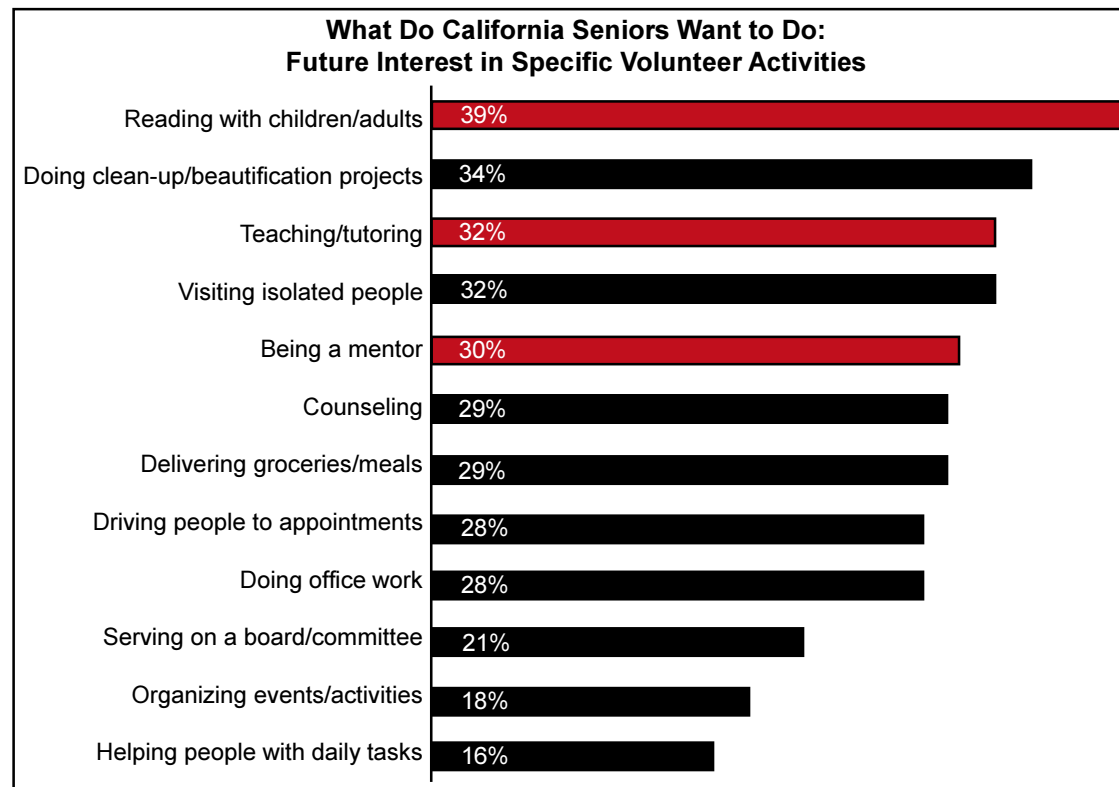
Though enduring and effective, current programs are limited in size and scope because of funding constraints. For example, California’s largest program, the federally-funded Retired and Senior Volunteer Program (RSVP), supports 33,500 service opportunities (including 5,000 tutors), enough for a mere 0.75% of California’s current population over age 60. Without expansion, RSVP will only be able to support 0.29% of the growing senior population by the year 2030. The Foster Grandparent Program (FGP), currently supported by the federal Corporation for National

and Community Service (CNCS) and formerly by the State of California, has a proven track record of over thirty years. In 2001, there were 1,695 Foster Grandparents in California, providing one-to-one mentoring to children with special needs. Aside from state funding to augment FGP, the Intergenerational Education Program established in 1984 (SB 2039, Roberti, Chapter 1592) is California's only state-funded intergenerational program. Administered by the California Department of Education, the Intergenerational Education Program engages 3,500 senior volunteers.

Together, these programs have provided opportunities for tens of thousands of older Californians, but due to limited resources, these senior service opportunities are not widely available throughout the state. Through careful planning, California can build on existing programs and create new innovative models matched more equally to older Californian's interest and to the scale of need.

Making the Right Match

Determining which activities interest volunteers is the first step toward matching those volunteers with



Source: GO SERV, *The California Assessment of Seniors and Service*, La France Associates, June 2001

service opportunities. As Ned stated during an interview about volunteering, *“I think everybody has to give back. I think the trick is you have to be able to do it at a time in your life when you can do a good job...It has to have a very significant benefit to the community, and it also has to match my particular skills.”* When asked about the types of volunteer activities they would like to do, 39% of seniors indicated that they would prefer reading with children or adults; 32% indicated their interest in teaching/tutoring; and 30% expressed interest in being a mentor.

“What senior volunteers can bring to schools is tremendous. They are educational mentors, career mentors, role models, and friends.”

—Kerry Mazzoni, California Secretary for Education

I first worked with him. And, a teacher—a great teacher I work with—and I kept after him until by the end of the year he was asking me to help him. And, he just—he changed completely from a very negative guy to one who was proud of what he was doing. It was just so good to see him growing like that. That’s the kind of thing...I can help kids get on the right track.”

In addition to the volunteer activity itself, seniors are concerned about many other facets of a volunteer opportunity including: location, number of hours, a safe and pleasant environment, support of staff, time of day, days of the week, duration of the commitment, age of the child to be served, and the organization offering the volunteer opportunity.

Making Volunteering Affordable and Accessible

Transportation issues are an important consideration in helping to make volunteering both affordable and accessible. Currently, most older Californians live on fixed incomes, derived primarily from Social Security. For those seniors, transportation and

I don’t have a car but use public transit. Often my choice of where to volunteer is limited, made according to transit. I could make a greater number of commitments if transportation was easier. I now tend, when a volunteer opportunity comes up, to think of it solely in terms of how can I get there.

—Focus group participant, San Francisco

I think a lot of seniors would volunteer if they had transportation. Be it a bus or somebody would come and get them, like a carpool or something.”

—Focus group participant, Fresno

other costs associated with volunteering can restrict their ability to make a service commitment. Senior volunteers cited transportation as the single greatest barrier to increased volunteerism, because transportation is a major expense. Beyond the expense, the lack of alternate transportation is also a barrier to volunteering—many seniors do not operate their own cars and public transportation options, when they exist, are often perceived as inconvenient or inadequate. While

some programs—most notably Foster Grandparents and Senior Companions—provide stipends, those programs are means-tested, and the allowable income level is extremely low. Many seniors who are not officially “poor” are ineligible for the small stipends these programs offer in return for an intensive commitment.

Surveys of older adults and reports from program directors strongly suggest that some form of incentive—bus passes, small stipends, vouchers, tax-free cash awards at the end of a term of service—would encourage more seniors to volunteer. Formal programs can create systems to match seniors to volunteer opportunities in their communities to ensure their continued participation. Incentives related to transportation issues are a direct solution to encourage senior volunteers to serve and provide them with greater accessibility to service opportunities.

Addressing Language Issues

An additional barrier for some California seniors is their limited English proficiency. While schools often want volunteers who are English speakers, other programs are also looking for bi-lingual volunteers. Developing a targeted outreach plan to recruit non-English speakers and providing English as a Second Language (ESL) training for seniors in those situations could go a long way to increasing volunteerism, particularly in economically distressed neighborhoods where the need for academic support is often acute.

Those aspects of volunteering that are considered “barriers” can be overcome by developing more effective volunteer support structures. Increasing senior volunteering will not happen spontaneously, rather, it will require public and private partnerships to effectively establish these structures. Policy makers need to be integrally involved in helping to establish more high-quality volunteer opportunities and develop a more streamlined process to service opportunities for the burgeoning senior population.

RECOMMENDATIONS: CREATE, CONNECT, AND COORDINATE

There is clear evidence that seniors in California, and across the country, are revolutionizing old ideas about retirement. Instead of a leisurely retirement, today's and tomorrow's seniors want to stay active and involved, and to make a significant contribution to their communities. Serving as mentors and tutors, California's talented and growing senior resource is unique in its potential to improve children's educational success. To harness this valuable senior resource, the state can take an active role in creating opportunities for seniors to serve and connecting those seniors interested in making a difference with high-impact volunteer opportunities.

In 2001, over a half a million people over age 65 (approximately 15% of California's over 65 population) indicated serving in teaching or tutoring roles. If California maintained its current 15% participation rate in teaching and tutoring volunteer roles, over 28,000 new seniors would become engaged in helping school children each and every year on average through 2030. And if California had the ability to engage the 31% of seniors who stated an interest in teaching/tutoring roles, a statewide army of 81,031 new recruits would become available to serve each year from 2002 to 2030. However, California's current programs do not have the means to take on this growing number of senior volunteers. The state must work to help increase the capacity of existing programs and develop new models to accommodate the growing number of senior volunteers.

"Some politicians view seniors as a problem, but I view them as a solution. They are America's great untapped resource. And we must take advantage of their wisdom and experience. The world is changing, but life's lessons never change. Those who do not give up, who stay involved and strive to make our lives better are the true guardians of democracy."

—Governor Gray Davis

At least twice in recent history, California and the nation has faced the challenge created by the transition of a large segment of the population. The provision of the Montgomery GI Bill for World War II veterans and the expansion of California's public schools, colleges and universities in anticipation of the Baby Boom generation resulted in the successful transition of large populations into productive roles in society. GO SERV's recommendations are founded on the idea of supporting an equally effective transition of California seniors from full-time employment into service. GO SERV's three recommendations are: (1) create high-impact volunteer opportunities; (2) connect interested seniors with these opportunities; and (3) coordinate efforts at all levels to expand senior volunteerism.

Recommendation 1: Create High-Impact Volunteer Opportunities

Program Innovation and Expansion:

California must work with schools, preschools and child development centers, volunteer and other public and private non-profit community organizations, to test, demonstrate, and evaluate strategies and program design elements such as:

- the effect of various incentives and supports of particular interest to specific groups of senior volunteers, (one such incentive is the “Silver Scholarships” initiative proposed in the FY 2002 federal budget that provides educational awards earned by senior volunteers that can be transferred to children of their choice);
- various compositions of public-private program partnerships and intermediaries;
- effective practices of urban and rural programs;
- issues related to different program venues such as preschools, primary grade classrooms, before and after school, school-based as well as community-based programs;
- supervision and coordination structures that augment school staff, and/or utilize specially trained volunteers, or other persons;
- various volunteer team models; and
- solutions to transportation issues.

With innovative partnerships between public and private organizations, California can enlarge existing and create new consortia to increase the number of senior volunteer opportunities to meet specific target numbers based on the number of underachieving school children.

Further Research and Planning:

The study upon which this report is based provides the first comprehensive overview of the interests of older Californians in service. Further research is recommended and additional planning forums should be convened. Follow-up research and planning will focus on:

- analyzing current and future volunteering efforts by California’s Latino population, foreign language

- speaking seniors, current non-volunteers, and seniors residing in low-income communities;
- developing a long-term plan for expanding senior service statewide by convening policy makers, volunteer program practitioners, potential investors, schools and other youth serving institutions, among others;
- conducting a needs assessment within state agencies and departments to determine where senior volunteer efforts could help state efforts and what existing resources could be used to support such efforts; and
- exploring the potential of senior volunteerism to impact a broader range of needs including helping the frail elderly to live independently, enhancing public safety, preparing for and responding to disasters and emergencies, providing health and other human services, and restoring and protecting the environment.

Recommendation 2: Connect Interested Seniors with Service Opportunities

Issue a Call to Service:

Senior service programs and volunteers have emphasized the need for state leadership in delivering a message regarding the value of service and challenging Californians to volunteer. As experience during the energy crisis has shown, when the state asks, Californians answer. This broadly cast call to service from the leadership of the state would then be followed with local requests for volunteers. Seniors themselves are clear that such a call would garner the most action. Claire indicated during her interview that: *“You’re more apt to do something if somebody faces you and says, “would you do it?” than when you read in the paper, “we need somebody to do it.”* Senior service organization representatives, focus group participants, as well as forum attendees indicated that they would respond to a call to service. The state is well positioned to issue such a call to action and connect Californians with service opportunities. The research clearly documents a dramatic increase in volunteerism among seniors who are asked to serve. By developing a high-profile outreach campaign, the state, in partnership with other stakeholder groups, can provide needed leadership.

“I started volunteering by doing a favor. I was called into the office and asked if I could do a favor. Before you know it, anytime anything had to be done, they sent for Leonard. Well anyway, that’s how I got involved in volunteering more and more.”
—Focus group participant, Los Angeles

Develop a Volunteer Brokering System:

Limited access to information describing available volunteer opportunities is an ongoing barrier to engaging potential volunteers. A user-friendly, centralized system would serve as a clearinghouse of information, enabling both prospective volunteers and those who provide volunteer opportunities to learn about each other easily and quickly.

Components of this system could include:

- a web page;
- a central toll-free phone line;
- county-level databases, providing access to programs and volunteer opportunities, which would be linked and compatible statewide;
- locally-based staff to provide assistance to volunteers looking for opportunities and programs; and
- a certification process for organizations sponsoring volunteer opportunities.

Databases would contain information on the specific characteristics of each volunteer opportunity and could provide a list of possible matches that meet the parameters provided by a prospective volunteer. Ned, a senior volunteer, has created such a system in his local community: *“You find out what they did in a previous life. And you ask them to share their talents. We have managed to take people who work for newspapers, and turn them into photographers for us. We have taken people that have done art layouts, and involve them in developing brochures. We have taken people with sales and marketing backgrounds, and had them help with fundraising. We have taken attorneys, and gotten them involved in personnel issues.”* By connecting seniors to opportunities within their area of expertise, California can harness a vast and untapped resource to help not only with improving the academic accomplishments of our students, but with many other facets of California communities.

Recommendation 3: Coordinate Efforts at All Levels—Federal, State, and Local**Streamline the Background Screening Process:**

Seniors serving in school-based venues must pass a background screening consisting of a criminal history check and a tuberculosis test. Without question, the tests are essential to ensuring the health and safety of the students being served, but delays in the processing of paperwork and duplicative testing procedures can cause prospective

volunteers to lose interest. Some regions of the state have access to new technologies that have minimized the problem, while others still struggle. GO SERV, working with the Department of Justice and other organizations, will develop recommendations to reduce the time and costs associated with these checks. Additionally, people who have passed the tests could become “card carrying volunteers,” and these credentials could be transferable to other volunteer opportunities.

Liability Insurance:

The state could explore the establishment of an insurance policy that would provide low-cost liability insurance for volunteer programs. Currently, programs are required to purchase their own liability insurance, which when purchased separately can be quite cost prohibitive. A liability insurance program would allow programs to invest a smaller portion of their allocated funds into a pool of resources, which the state could then use as leverage for purchasing liability insurance at a better group rate.

Coordinate Agency Efforts:

At the state level, a number of agencies are or could become active in intergenerational programming, including: GO SERV, departments of the California Health and Welfare Agency, Office of the Secretary for Education, California Department of Education, Governor’s Mentoring Partnership, and the California Department of Justice. At the federal level, the Corporation for National and Community Service is the lead agency with respect to senior service; and locally the responsibility rests primarily with senior volunteer programs, Area Agencies on Aging, volunteer centers, faith-based and other community organizations. Each of these agencies has networks and grantees that could, if mobilized, assist in supporting and developing senior volunteer opportunities. In addition, better coordination across governments would maximize the ability to integrate and expand senior service opportunities and minimize duplication.

In Conclusion

California is home to a vast and rapidly growing resource, one of unparalleled diversity and richness. Tapping into this resource will require a long-term commitment that will yield great benefits. While the attitudes of older Californians toward retirement have already changed dramatically, changes in the attitudes and perceptions of Californians toward seniors have not kept pace. Are older Californians seen as consumers of government services living lives of leisure within gated communities, or vital neighbors willing and able to enlist in intensive service

“A lot of times I’m just there being a grandma. I feel like I’ve accomplished a lot – the kids’ grades have improved and I’ve helped kids go on to high school. A lot of times during the social studies lessons, kids will ask me, “Grandma, do you remember these things that happened?”

—Focus group participant, Fresno

commitments that span decades? Research has demonstrated that seniors want to continue to give back to their communities, to contribute to them and to “make a difference.” Creating the infrastructure to accommodate a senior volunteer force gives us an opportunity to reshape the way older Californians interact with and impact their communities.

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APPENDIX 1

Federal National Senior Service Corps Programs:

National Senior Service Corps (NSSC) programs are implemented through state and local structures and administered at the federal level by the Corporation for National and Community Service (CNCS). CNCS also has a California State Office that works closely with these programs that include:

Retired and Senior Volunteer Program (established 1971): RSVP volunteers, who must be 55 or older, serve from a few to over 40 hours a week in public and nonprofit organizations that include schools and other youth-serving settings. There are approximately 33,500 volunteers serving in 41 multi-site RSVP projects in California. Funding includes \$3.4 million from CNCS. There is currently no state funding.

Program Model: Roseville Reads Literacy Project

With funding from America Reads, FGP and RSVP have been collaborating for three years on a project in the Roseville City Unified School District. In 1999-2000, 48 FGP and RSVP tutors served more than 400 students through the project, which includes these elements:

- **The volunteers—all of whom are either Foster Grandparents or RSVPs—work together as a team in each school where the program is located.** There are at least 6 volunteers on a team. Foster Grandparents serve for 20 hours a week, while RSVPs serve from 3 to 12 hours a week. In addition, three Foster Grandparents serve as Leaders, on-site coordinators who function as the intermediaries between the volunteers and the school's principal and other staff.
- **There is a broad presence in the school district.** The project has a team in each of the district's Title 1 schools—5 elementary schools, a middle school, and a high school.
- **Schools play an active role in the program.** Each school provides its volunteers with tutor training that is specifically focused on that school's reading program and particular student needs, and also provides ongoing support for its volunteers. The program's structure and volunteers' specific roles also vary from school to school, depending upon needs.
- **Foster Grandparents and RSVPs perform similar services.** They tutor children in reading during and after school, and help with homework and other activities in the after-school program. In the middle school and high school, they also provide tutoring in math.

- **Volunteers meet together regularly.** The team at each school has regular, formally scheduled meetings, as well as ongoing informal discussions. All of the volunteers in the project, across the school district, come together approximately once a month.

Evaluation by the Roseville City Unified School District had highly positive findings. Students' reading levels increased significantly; behavior problems decreased; and students were more "on task" in the classroom.

Foster Grandparent Program (established 1965): FGP participants serve as mentors, tutors, and caregivers for children and youth. Participants must be 60 or older and meet income eligibility requirements. They serve 20 hours per week and receive small stipends. There are approximately 1,700 Foster Grandparents serving in 34 FGP programs in California (this includes 11 programs operated through the Department of Developmental Services). FGP participants perform over 1.75 million hours of service per year. Funding includes \$5.5 from CNCS and has included up to \$1.1 million in prior fiscal years from the California Department of Aging.

The third NSSC program, **Senior Companions** (established 1968); involves seniors in providing one-to-one services to the frail elderly. As with FGP, participants must be 60 or older and meet income eligibility requirements. They serve 20 hours per week and receive small stipends. In California, approximately 1,000 Senior Companions serve in 25 projects. Funding includes \$1.8 million from CNCS and up to \$2.0 million in prior fiscal years and \$500,000 currently from the California Department of Aging.

State Programs:

The state supports senior service through a number of different agencies that focus on service and volunteerism, aging, education, and other aspects of youth development. They are:

Governor's Office on Service and Volunteerism (established 1994): The Governor's Office on Service and Volunteerism (GO SERV) was established in response to a federal requirement for a state-level commission to receive and manage AmeriCorps funds, to undertake coordinated planning across all Corporation for National and Community Service-funded programs in the state, and to fulfill a broader role of advancing service and volunteerism in California. Annually, GO SERV administers approximately \$30 million through close to 60 local assistance grants—to implement AmeriCorps at the community level. Although none of these programs concentrate solely on engaging seniors in working with children and youth, most are involved with addressing educational and youth development needs and a significant percentage generate volunteers to complement the work of AmeriCorps—and many of these volunteers are older Californians.

California Department of Aging (funding for the National Senior Service Corps programs was initially approved in 1984 and increased in 1996 through the Older Californians Act): The California Department of Aging (CDA) provides funding to match federal Foster Grandparent Senior Companion Program (FGP/SCP) funds and to expand FGP/SCP statewide—beyond the number of sites that could be supported with federal funds. CDA contracts with and provides leadership and direction to the Area Agencies on Aging (AAA) that coordinate programming at the community level—either implementing the programs on their own or through a contract with a local organization such as a Volunteer Center, faith-based organization, senior center, or social service agency. Funding includes \$1.1 million for FGP and \$2.0 million for SCP.

The California Department of Education, Intergenerational Education Program

(established 1984): Senior volunteers, 55 and older, provide instructional and support services to K-12 students. Their services vary from program to program and from school to school, based upon schools' needs and volunteers' interests. Senior volunteers do one-to-one tutoring, read to small groups of students or to whole classes, help in the school library, and participate in speakers' bureaus where they give presentations to classes on special subjects, including history, music, and geography. In some cases, seniors provide clerical help to schools or teachers. In FY 2000-01, ten agencies around the state operated an Intergenerational Education

Program—six public school districts, two county offices of education, a University of California campus, and a nonprofit agency. In all, there are approximately 3,500 senior volunteers providing services to 35,000 students. The program is funded by the California Department of Education, which allocates \$171,000 equally among the ten grantees.

Program Models: DOVES and Learning Time Partnerships Program

These two programs are representative of the ten Intergenerational Education Programs that are funded by the California Department of Education.

- **DOVES (Dedicated Older Volunteers in Educational Services)** operates in the Los Angeles Unified School District. It works with each school to identify the roles its volunteers can best fulfill. Roles include helping in the library or the classroom, serving as clerical or recreational assistants, or sharing with students their knowledge about subjects such as music or art.

Some of the volunteers serve more intensively as one-to-one and small-group literacy tutors for at-risk students in grades K-3. DOVES uses a specially designed literacy tutoring curriculum, and also teaches volunteers to develop educational games that make learning fun for the children. Ongoing training is a hallmark of the program: volunteers participate in both pre-service and ongoing training at the schools where they serve.

- **Learning Time Partnerships Program**, the Intergenerational Education Program operated by the Sacramento County Intergenerational Center, recruits senior volunteers for two literacy projects: *Read Aloud* and *Step by Step*. In *Read Aloud*, volunteers, who can serve as little as one hour a week, help students develop a love of books by reading to them in the classroom. *Step by Step* includes two tutoring programs. “Reading Comprehension” helps tutored students improve their fluency and develop comprehension strategies and skills. The volunteers, who serve two hours a week, meet individually with students to listen to, and help, them read. “Phonics and Spelling” focuses on beginning reading instruction. Volunteers serve four hours a week. Each is matched with a maximum of three students and meets one-to-one with each student at least twice each week.

The program combines flexibility—options for the volunteers—with a well-defined structure for the services they are contributing. Volunteers receive training geared to the specific role they will be filling. Each participating school is required to have a staff member who is the designated site coordinator, helping tutors to implement the program and acting as a liaison between teachers, tutors, students, and parents. Tutors also communicate regularly with their tutees' teachers.

The Office of the Secretary for Education Academic Volunteer and Mentor Service Program

(established 1992): Administered by the Office of the Secretary for Education, this program formerly recruited volunteer mentors to serve as role models and provide academic guidance and companionship to at-risk children and youth in schools. Grants totaled \$10 million in fiscal year 2001/2002. They were awarded for a term of three years, with a maximum annual grant amount of \$100,000 per site. Over 145 school-based mentoring programs in California received funding through the program, with 17,000 adult mentors serving 15,000-20,000 students annually until program funding was suspended in 2003. Seven of the sites focused on recruiting seniors to serve as mentors in elementary, middle, and high schools.

Two other state initiatives also offer avenues for senior service. **The After School Learning and Safe Neighborhoods Partnership Program** (established in 1998) supports the establishment of local after-school education and enrichment programs.

The Governor's Mentoring Partnership (established in 1996, formerly the California Mentoring Initiative), works with regional mentoring coalitions and over 140 local organizations to promote mentoring for youth. PlusONE Mentors, Inc., in Redding, is an example of a Governor's Mentoring Partnership program that recruits seniors to serve as mentors.

Local Programs:

California is home to many other programs that rely on seniors to provide services to children and youth. A few examples follow.

Stand-alone local programs:

Seniors serve in a wide range of local programs supported by retiree organizations, religious institutions, community-based organizations, and a huge range of other private and nonprofit groups. Examples include:

THINK Together (established 1994): The program operates 8 after-school learning centers in low-income areas of Orange County. The focus of these centers is primarily academic. Students in grades 1-12 receive homework assistance, ESL instruction, remedial tutoring, computer training, and SAT preparation classes. Each week, about 1,300 students receive help from more than 400 volunteers, including about 85 older adults.

Project SHUE (Safety, Health, Understanding and Education) (established 1992, in Westminster): An alliance between the local Soroptomist International club, local schools, city government, and the Westminster Senior Center, this project recruits low-income seniors to tutor and mentor Latino and Vietnamese students. The seniors receive a stipend. After they complete nine months of service, they are eligible to apply for school district positions as teacher's aides.

Local programs that are part of a national project:

These programs have a national office and sites around the country, including California. Examples include:

Experience Corps (established in 1996): The program places teams of older adults in schools to provide one-to-one tutoring to children, as well as other literacy support services. There are now 18 Experience Corps programs around the country, including one in San Francisco at the Sunset Neighborhood Beacon Center.

As the program model for the CNCS Seniors for Schools demonstration project, Experience Corps was evaluated by Project STAR. Findings showed a significantly positive impact on tutored students' reading abilities. The findings also showed a positive impact on schools as a whole, including increasing children's respect for older adults.

Program Model: Experience Corps

Experience Corps programs are designed to take place in schools or in after-school settings. Key elements include:

- **Options:** Volunteers may choose to work half-time (15 hours a week), part-time (2 to 10 hours a week), or on an episodic/as-needed basis. The type of work is also flexible. Volunteers can serve children directly through tutoring, homework help, and related activities, or indirectly through activities such as parent involvement campaigns and library book drives.
- **A team-based structure:** A team of four to six half-time corps members serves at each school, and those members receive a small stipend. Having this number of older adults in the school for extended periods of time has a positive impact on the overall school environment. The team structure also promotes joint problem solving among volunteers and provides social support. This approach follows gerontological research showing that strong social networks are instrumental in preserving good health among older adults.
- **Coordination with the schools:** Each Experience Corps program works closely with schools where the volunteers will be serving in order to identify needs, adapt the program to best serve those needs, and work through logistical questions. On-site coordinators (often, these are VISTA volunteers) serve as liaisons between volunteers and school staff. Volunteers also communicate regularly with teachers about the students they are tutoring.
- **Consistency:** Tutors meet one-to-one with the same students 2-4 times a week throughout the school year. The tutor thus provides a consistent, caring adult presence for the child, which contributes to positive effects, such as heightened self-confidence, that extend beyond improved reading skills.
- **Learning:** Experience Corps promotes the continued learning and growth of volunteers through pre-service training, weekly team meetings, monthly in-service training, conferences, and other special programs and events. The emphasis on learning is designed to develop not only successful tutors and mentors, but also strong advocates for schools and children.
- **Leadership:** Members are encouraged to assume leadership roles, acting as team leaders and working closely with school/site administrators to design and initiate projects.

Rolling Readers USA (established in 1991): Rolling Readers operates two programs. In “Read Aloud,” volunteers read aloud each week to children in their classrooms, and the children also receive free books. In “Tutor USA,” a team of volunteers is assigned to teachers in a school, where they provide one-to-one literacy tutoring to students. Approximately 65-70 percent of Rolling Readers volunteers are older adults. There are hundreds of sites around the country, with 16 chapters in California.

Local programs that recruit volunteers and manage volunteer programs: There are 39 volunteer centers with 56 branch sites located through the state. These volunteer centers are structured either as independent nonprofit organizations governed by a board of directors or as programs of another nonprofit organization, such as United Way. According to the statewide association, Volunteer Centers of California, 50,000 senior volunteers were referred by volunteer centers in 2000. Twenty-two volunteer centers have in-house senior programs (many of these are part of the federal or state Senior Service Corps Programs that were previously mentioned).

APPENDIX 2

I Would Start or Do More Volunteer Work...	Seniors Overall		Seniors 50-54 Years		Seniors "Maybe" Interested In Significant Commitment	
	# Responding	% "True"	# Responding	% "True"	# Responding	% "True"
If I Knew The Volunteer Opportunity Was Meaningful Or Made A Difference in People's Lives	458	74.2%	92	78.3%	196	87.8%
If I Found An Organization With Values and A Mission I Truly Support	458	73.8%	90	86.7%	196	82.7%
If I Knew I Had The Skills Needed To Do A Good Job	458	59.8%	92	63.0%	196	74.5%
If I Got To Meet Interesting People and Make New Friends	450	55.8%	88	68.2%	188	65.4%
If I Knew The Volunteer Environment Was Both Safe and Pleasant	448	53.3%	92	60.9%	190	67.9%
If The Volunteer Opportunity Was Offered Or Needed By An Organization I Already Belong To	450	50.9%	92	54.3%	190	57.4%
If The Organization Trained Me To Do The Work	452	49.1%	92	65.2%	196	62.2%
If The Organization That Needed Help Was One That, In The Past, Helped Me Or Someone I Love	448	48.2%	90	64.4%	188	56.4%
If I Weren't So Busy With Work	460	47.6%	94	78.7%	196	57.7%
If I Could Be Given Clear and Specific Tasks To Do	452	46.9%	90	55.6%	194	58.8%
If The Volunteer Opportunity Had Convenient Hours	460	44.8%	92	56.5%	194	60.8%
If I Weren't So Busy With Family	456	39.0%	94	63.8%	196	44.9%
If I Had Better Transportation Or If The Volunteer Opportunity Was Closer To Where I Live	452	37.6%	92	45.7%	186	53.7%
If I Were Given Assistance Finding Out About Volunteer Opportunities	450	35.3%	90	48.9%	188	50.5%
If I Were Recognized Or Appreciated For My Work As A Volunteer	452	33.8%	90	37.8%	188	47.3%
If I Knew Someone Else Who Also Worked Or Volunteered There	448	32.8%	88	50.0%	186	41.4%
If I Received a Regular Stipend	452	26.1%	88	40.9%	188	35.1%
If I Were In Better Health	454	24.9%	90	22.2%	188	23.9%
If I Received Some Benefit, e.g. Meals, Prescription Drug Discounts, Token Payments, For My Time	458	24.5%	92	34.8%	194	34.0%
If Organizations Improved Their "Attitudes" Toward Volunteers	452	23.2%	90	31.1%	188	33.5%
If I Were Given An Educational Award Or Scholarship That Could Be Transferred to Others	450	21.1%	90	35.6%	188	23.9%
If I Were Given Special Accommodation For Physical Disabilities	450	8.7%	90	11.1%	188	10.1%

APPENDIX 3

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